



Figure 1

## DEFINE CUSTOMER VALUE AND EXPERIENCE

|   |   |
|---|---|
| A.1 Review Existing Data                                  | A.1.1 Gather customer information<br>A.1.2 Organize the information<br>A.1.3 Identify the target customer   |
| A.2 Develop Customer and Environment Profiles             | A.2.1 Create the customer profile<br>A.2.2 Create environment profiles<br>A.2.3 Validation check  |
| A.3 Develop Current Customer Experience Flow              | A.3.1 Identify customer experience components<br>A.3.2 Create current experience flow<br>A.3.3 Refine focus<br>A.3.4 Annotate current experience flow<br>A.3.5 Validation check   |
| A.4 Understand the Competitive Experience                 | A.4.1 Identify current competitive customer experience<br>A.4.2 Identify current customer experience<br>A.4.3 Prioritize<br>A.4.4 Compare current and competitive customer experience<br>A.4.5 Annotate current experience flow<br>A.4.6 Validation check           |
| A.5 Identify Customer Experience Benefits                 | A.5.1 Create customer experience benefit statements<br>A.5.2 Create vignettes<br>A.5.3 Create a roadmap<br>A.5.4 Validation check   |
| A.6 Create Value Propositions                             | A.6.1 Review roadmap<br>A.6.2 Create value proposition<br>A.6.3 Validation check  |
| A.7 Create Success Criteria                               | A.7.1 Define post-release success criteria<br>A.7.2 Define the scale<br>A.7.3 Identify the measurement method<br>A.7.4 Refine criteria list<br>A.7.5 Define goal<br>A.7.6 Define pre-release success criteria<br>A.7.7 Establish baseline<br>A.7.8 Validation check |
| A.8 Validate the Customer Value and Experience Definition | A.8.1 Gather information<br>A.8.2 Determine the risk<br>A.8.3 Decide the methodology<br>A.8.4 Investigate ongoing research<br>A.8.5 Investigate resources<br>A.8.6 Validation check   |

Figure 2A

## DEFINE A SOLUTION PATH

|   |   |
|---|---|
| B.1 Identify the Customer Experience Gaps           | B.1.1 Prepare<br>B.1.2 Identify gaps  |
| B.2 Define the Solution Path                        | B.2.1 Prepare for brainstorming<br>B.2.2 Review the gaps<br>B.2.3 Brainstorm solution ideas<br>B.2.4 Group solution ideas<br>B.2.5 Identify solution concepts<br>B.2.6 Select solution path<br>B.2.7 Further define the solution path<br>B.2.8 Capture solution ideas<br>B.2.9 Annotate the roadmap   |
| B.3 Define the Future Customer Experience Flow      | B.3.1 Identify future customer experience components<br>B.3.2 Create future experience flow<br>B.3.3 Annotate future experience flow  |
| B.4 Communicate the Vision                          | B.4.1 Develop scenarios<br>B.4.2 Communicate vision   |
| B.5 Define a High-Level Solution Architecture       | B.5.1 Action decision<br>B.5.2 List the future experience components<br>B.5.3 Identify the elements<br>B.5.4 Create element profiles<br>B.5.5 Construct a high-level architecture<br>B.5.6 Conduct walk-throughs<br>B.5.7 Review architecture   |
| B.6 Refine the Solution Architecture                | B.6.1 Action decision<br>B.6.2 Define use-cases<br>B.6.3 Conduct walk-throughs  |
| B.7 Define the Solution Value Delivery System (VDS) | B.7.1 Define the output process functionality to deliver the experience<br>B.7.2 Record key components and critical processes onto the VDS map<br>B.7.3 Identify the key partners that manage, contribute or impact the process<br>B.7.4 Understand the partner commitments for the VDS<br>B.7.5 Identify gaps or opportunities in delivering the value |
| B.8 Validate the Solution                           | B.8.1 Validate acceptability with customers<br>B.8.2 Validate the feasibility of the solution<br>B.8.3 Risk assessment  |

Figure 2B

## CLOSE THE LOOP

|                                      |  |
|--------------------------------------|--|
| C.1 Managing Solution Implementation | C.1.1 Define the project<br>C.1.2 Solution implementation management best practices  |
| C.2 Pre-Release Success Criteria     | C.2.1 Establish a measurement schedule<br>C.2.2 Measure the solution and track results<br>C.2.3 Iterate solution as needed and recheck against the goals   |
| C.3 Close the Loop                   | C.3.1 Measure the effectiveness of the solution using the post-release success criteria<br>C.3.2 Act on the success criteria results<br>C.3.3 Repeat the process through ongoing measurement<br>C.3.4 Understand the relationship of the solution to the customer experience |

Figure 2C